

ATTACHMENT B  
SPECIFIC INSTRUCTIONS

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Approved For Release 2002/05/17 : CIA-RDP88-00893R000200040001-8

ERRATA SHEET

Specific Instructions

- Page 11, para 4.4 - Add subparagraph (d)  
"Work previously performed and/or systems  
implemented utilizing Hewlett-Packard 2100 or  
21MX CPU and peripheral equipment and type(s)  
of language and operating system utilized."

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1 INTRODUCTION

These instructions are offered to assist you in the preparation of a proposal in response to the request for the design, implementation, test and placement in an operational status of a Remote Data Terminal (RDT) system, plus the delivery of associated documentation. The following should help you respond in a manner that will assist us in determining your relative ability to satisfy the requirements more fully defined in the Statement Of Work (SOW). These instructions are not intended to restrict your proposal effort. If you wish to make input relative to your ability which does not fall precisely within our guidance material, you may provide it as long as you also provide the information that we will need for our evaluation, which is herein defined. Any questions relative to these instructions should be directed to the Contracting Officer pursuant to the instruction of the Cover Letter of the Request for Proposal (RFP).

2 METHOD OF EVALUATION

2.1 Introduction

The objective of the RDT proposal evaluation effort is to select and recommend one Contractor to the Source Selection Review Board. The Proposal evaluation plan outlined in this section is designed to do an in depth analysis of several Proposals in a timely manner.

The Proposal evaluation process is separated into three parts: Planning, Initial Evaluation, and Final Evaluation. The Planning activity will consist of the creation and approval of the Proposal Evaluation Plan and development of detailed procedures, schedules, and evaluation work sheets or forms. This effort will be coordinated by the CCTR and the Contracting Officer.

Initial Evaluation will be performed by the Government's proposal Review Team. The results of this effort will be Proposal ranking and identifying of strong and weak points for each of the Propcsal sections or sub-secticns. Final Evaluation will consist of reviewing Initial Evaluation results and identification of unacceptable Proposals, detailed analysis of the remaining proposals, possible further identification of unacceptable Frcpcals, and written

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or oral discussions with any Offeror found to be in the acceptable range. The result of the Final Evaluation will be a recommendation to the Source Selection Review Board specifying a final selection or other appropriate action.

2.2 INITIAL EVALUATION

As proposals are received, the Contracting Officer will log (time stamp) each proposal and forward copies of Volumes I and III to the proposal Review Team.

Each member of the proposal Review Team will be assigned one or more specific Proposel sections to evaluate for all Proposals. His evaluation will consist of scoring, ranking and identification of strong and weak points; and any comments he wishes to include.

The list of strengths and weaknesses for each proposal will be developed, together with an indication of whether weaknesses are considered major or minor and whether they are correctable. Not only are strengths and weaknesses a valuable shorthand summary of discriminators among proposals, but they provide a good measure of what the points assigned to different criteria are really worth in the opinion of the reviewer.

In addition to the work outlined above, the Contracting Officer will develop a cost evaluation matrix in order to judge or compare proposal costs for specific line items and services.

2.3 FINAL EVALUATION

The first step in Final Evaluation will be to review the data provided by members of the proposal Review Team. As a result of this review (or screening) the evaluation of any proposal which is unacceptable may be discontinued because: 1) It does not represent a reasonable initial effort to address itself to the essential requirements of the RFP, or clearly demonstrates that the Offeror does not understand the requirements of the RFP; 2) a substantial design deficiency is inherent in the proposal and sufficient correction or improvement to consider the proposal acceptable would require virtually an entirely new technical proposal; 3) it contains major technical and management deficiencies or omissions or out-of-line costs which discussions with the Offeror could

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not reasonably be expected to cure.

The next step in Final Evaluation will be to review the proposals with a view toward determining which are within the competitive range; namely, those which have a reasonable chance of being selected for final award. In making this determination, the potential for improving the competitive position of the proposals by written or oral discussions may be evaluated. In determining the competitive range, consideration shall be given to Technical and Management factors and Price. The initial number of proposals considered to be within the competitive range as a result of the screening process may be narrowed as a result of this examination.

During the last step of Final Evaluation, the Contractor most likely to perform in the desired manner and under the terms most advantageous to the Government is determined. Preparatory to formulating its final evaluation, the evaluation team may:

- Conduct written or oral discussions with those Offerors found to be within the competitive range;
- Identify the significant strengths and weakness of the Offerors;
- Ascertain, by plant visits or otherwise, the capabilities of Offerors within the competitive range; and then
- Exercise its best collective and objective judgement in arriving at its findings for presentation to the Source Selection Review Board.

Considering all reports, information received from Offerors through plant visits, written and oral discussions, and the information received from other sources, the evaluation team shall score proposals from a mission suitability viewpoint.

#### 2.4 SOURCE SELECTION REVIEW

The evaluation team shall forward its recommendation to the Source Selection Review Board. In addition, if requested, the evaluation team shall give the Board a detailed briefing on all aspects of the proposal evaluation. Upon receipt of

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the recommendation and supporting data, the Board will consider all factors and either accept or reject the evaluation team's recommendation.

If the Board concurs, they will forward the recommendation to the Source Selection Authority.

If the Board does not concur, they shall provide specific reasons and appropriate supporting data to the evaluation team to be used for further evaluation.

2.5 SOURCE SELECTION

The Source Selection Authority shall receive the recommendation(s) from the Source Selection Review Board and make the final selection of the RDT Contractor.

2.6 NOTICE AND DEBRIEFING

There are three points in time in this procurement process when it may be determined that a proposal is no longer to be considered for Contract award:

After evaluation of proposals is submitted,

After written or oral discussions with those then in the competitive range, and

Upon rejection by the Source Selection Authority.

In the first two instances, each Offeror involved shall be promptly notified that his proposal is no longer to be considered for Contract award, stating the reason that his proposal was unacceptable or determined not to be in the competitive range, as appropriate. In the third instance, each Offeror involved shall be promptly notified, stating the reason that the Source Selection Authority has selected the specified Offerors for final contract negotiations. In the event two or more offerors are so selected, the unsuccessful Offeror(s) shall, of course, similarly be notified after final selection of the one Offeror.

In any of the three instances, if any Offeror so requests in writing, it shall be accorded a formal debriefing after final Contractor selection, but normally before award.

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3 EVALUATION CRITERIA

3.1 Basic Evaluation

In its evaluation of technical and management factors the Government shall make full use of Cost Proposals to help determine the Offeror's understanding of the requirements of the RFP, as well as to assess the validity of the Offeror's approach to performing the work in accordance with requirements. Cost realism or lack thereof shall enter into the Government's assessment of the measure of understanding possessed by each Offeror.

Proposals will be scored in the categories of Technical, Management, and Cost. A perfect score in the technical and management categories is 100 points (each category).

3.2 Category Weights

The percentage distribution of weights for the categories of Technical, Management, and Cost are:

Technical	35
Management	15
Cost	50

3.3 Evaluation of Technical Proposals

The proposals will be evaluated in terms of the following, ordered by importance:

- (a) Acceptance and understanding of the problem and the preliminary design proposed;
- (b) Software design choices as specified in the proposal;
- (c) Specifications of software subsystems and the interfaces between them;
- (d) Training for follow-on software support;
- (e) Documentation Standards;

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(f) Previous Experience.

3.4 Evaluation of Management Proposal

The management proposal will be evaluated in terms of the following, ordered by importance:

- (a) The qualifications and experience of the key program personnel and their level of commitment to the program, and availability and commitment of company resources;
- (b) The clarity, extent and purpose detailed in the Project Management Plan.

3.5 Scoring Procedure

The final score will be computed by weighting the category scores and summing. For example:

Technical (35%)

Vendor A technical score = 95.5  
 $95.5/100 \times 35\% = .33425$

Management (15%)

Vendor A management score = 80.5  
 $80.5/100 \times 15\% = .12075$

Cost (50%)

Lowest price received = \$100,000  
Vendor A price = \$125,000  
 $\$100,000/\$125,000 \times 50\% = .4000$

Vendor A Total Score

Technical	= .33425
Management	= .12075
Cost	= .4000
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Total	= .8550

3.6 Final Selection

Final selection shall be in accordance with the evaluation factors described herein, and shall be made in favor of the Offeror whom the Government considers will perform the contract under the terms most advantageous to the Government.

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4. PROPOSAL FORMAT

Please submit your proposal in three (3) volumes identified as follows:

Volume I - Technical Proposal & Management Proposal

Volume II - Cost Proposal

Volume III - Experience, Past Performance and Other Factors

4.1 Cover Letter

Cover your proposal with a letter and attach the certifications and acknowledgements referred to in Additional Instructions and Contractual Representations. Please include at least the following information in your cover letter and have it signed by an official authorized to bind contractually your company.

- (a) The names and phone numbers of persons authorized to negotiate this proposal and the names and phone numbers of persons to be contacted for clarification or questions relating to this proposal.
- (b) A statement that the proposal is firm for a period of not less than 90 days from the proposal due date.
- (c) The complete business address, including country, of your firm. Include the corporate name that is to be used on any resultant contract and the remittance address, if different from that above. If this name does not identify a parent company or sponsoring corporation name, also provide such identity as appropriate.
- (d) A statement as to the acceptance of the anticipated contract provisions and proposed contract schedule, or specific exceptions taken to any of the terms and conditions.

4.2 Volume I - Technical Proposal & Management Proposal

Both technical and management information is included within

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the technical content should provide a basis for evaluation as outlined in this section. As a minimum, your proposal should include the following:

## (a) Understanding the Requirement

- (1) A narrative defining your understanding of the work outlined in the SCW. Include a discussion of any exceptions that you take to the SCW together with the rationale for the exception(s).
- (2) A chart form compliance summary on a paragraph by paragraph basis shall be submitted for the Functional Specification. All of the requirements in the Functional Specification are mandatory requirements, however, paragraphs consisting of a title only or that are totally discussion shall be complied with by stating title only or discussion.
- (3) A detailed narrative and/or figurative description shall be submitted for each paragraph in the Functional Specification requiring design and implementation in the final system.
- (4) A preliminary design plan showing the full scope of the system software and implementation.
- (5) Sample(s) of the proposed software documentation.

## (b) Project Management Plan

- (1) Propose a project management plan which will delineate management planning responsibilities and provide an effective means for monitor and control (quantitative and qualitative) of the project. After award, full use of the project management plan will be made by the

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Government to evaluate project status.

- (2) Describe your proposed project management plan outlining management functions and overall approach to the integration of these functions. Lines of authority should be shown, including corporate management visibility.
- (3) The project management plan should define the method and timing appropriate for configuration management, design reviews, software management, integration management and product assurance. The following shall be included as a minimum:
  - ((a)) Proposed completion dates for milestones specified in the SOW.
  - ((b)) The proposed methodology and schedule for resolving any remaining requirement inconsistencies, ambiguities and design approach variances.
  - ((c)) The proposed implementation, system integration, checkout and test plan, manpower loading, use of Government facilities, schedule, PERT (or equivalent) charting, and the management methodology to be used to keep the schedule from slipping.
  - ((d)) Proposed reporting methods and level of detail working interfaces between the Government and the Contractor, and all relationships (both contractual and day to day) with subcontractors.
- (c) Key Personnel
  - (1) A resume from the Project Manager shall be provided. The degree of his commitment to the requirements of the SCW should be stated.

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(2) A resume for each of the other key personnel shall be provided. The degree of their commitment to the requirements of the SOW should be stated. The rationale for your choice of which positions are key shall be discussed.

(d) Corporate or Company Resources

Availability of backup for key and other personnel and extent of home office management and technical assistance shall be discussed.

(e) Non-corporate or Non-Company Resources

Any significant contribution of non-corporate or non-company resources in response to the solicitation or planned use of such resources in event of a contract award shall be stated. The level of commitment of such resources shall also be stated.

(f) Training for Follow-on Software Support

Provide a detailed plan describing how you propose to fulfill the intensive programmer training requirement described in the SOW, paragraph 6.

4.3 Volume II - Cost Proposal

Your cost proposal shall consist of a presentation of cost and pricing data covering work to be accomplished in accordance with the SOW.

The Government contemplates award of any resultant contract on a firm fixed price basis.

The offeror's cost proposal shall contain sufficient factual data to support the technical and management aspect of its proposal. As a minimum, the offeror shall organize the requirements of the solicitation in a work breakdown structure (WBS) that will be used to identify cost in the performance of any resultant contract. A complete and detailed description shall be provided for all tasks which

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shall correlate to the SCW. Contractor prepared copies of summary form DD633 with supporting information shall be provided as an input to all tasks identified in the WBS. Basic pricing assumptions shall be clearly and accurately stated.

For proposal and evaluation purposes, assume that the final installation and activation phase will last 30 calendar days.

4.4 Volume III - Experience, Past Performance, and Other Factors

At a minimum, your experience and past performance discussion should include:

- (a) A list of similar Government and industry contracts in excess of \$50,000 received in the past 3 years or currently in negotiation in which performance of work similar to that described in this RFP was pursued, showing contract numbers, Government agency or industrial client, type of contract, and a brief description of the work for each such effort.
- (b) An identification of any extensions to the period of performance, from work added to the scope, and from performance that cost more than predicted or estimated for current, or any contract completed within the past year, shall be submitted.
- (c) Identity and explanation of any terminations for default.